Module 7

Chapter 2

Arranging Training

Chapter Overview

Introduction

This chapter guides you through the processes of arranging training, to include Activities, Events, and creating Local Suppliers.

Chapter Contents

Continued on next page

Creating a Local Supplier for a Local Activity

Purpose

This procedure will guide you through the steps for creating a local supplier (vendor) for a local Activity.

Before You Begin

You must create a local supplier before you can set up a local Activity (course), if the supplier is not in the DoD Course Catalog.

Who Does This

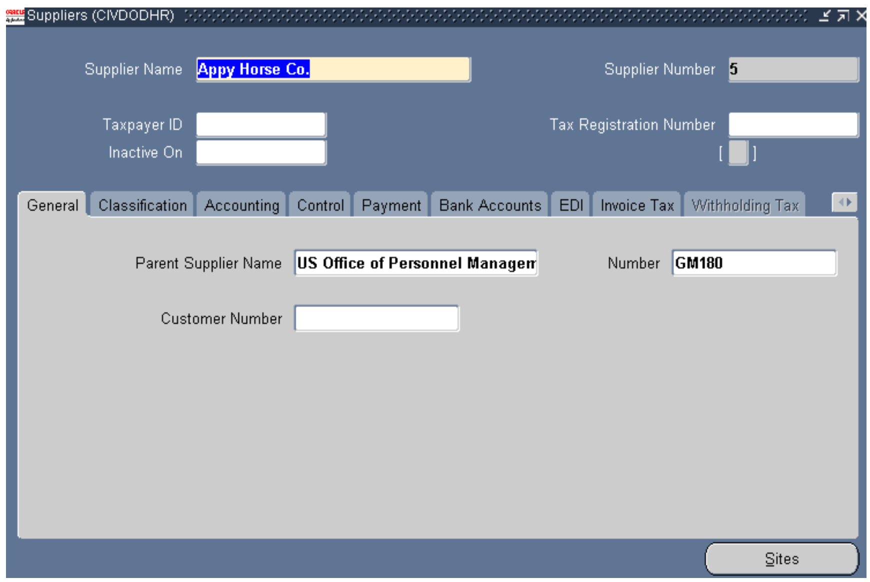
Components will determine who has the responsibility.

Continued on next page

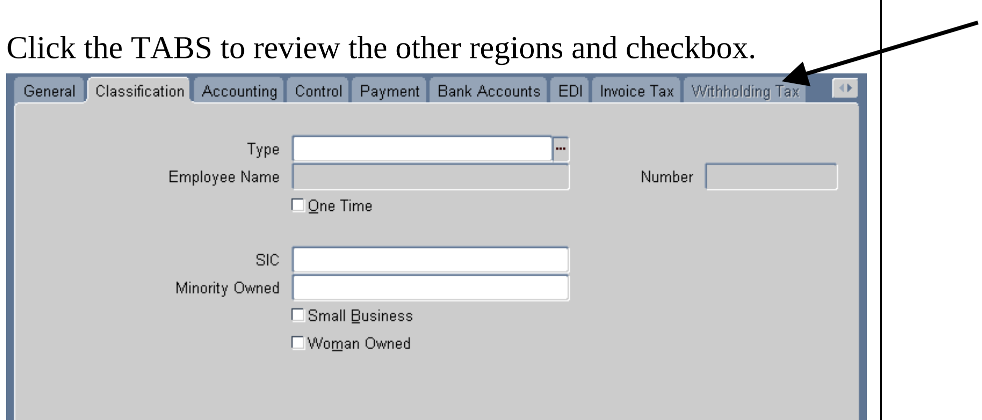
Chapter Overview, Continued

Accessing the Suppliers Summary Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation Path → <i>Organizations</i> → <i>Supplier</i> → <Open>.</td></tr>
<tr><td>2</td><td>The Suppliers Summary window opens with nine tabs, a One Time checkbox, an inactive DDF, and two Taskflow buttons. If you have built Local Suppliers, query the existing list by pressing F11 then press both the CTRL + F11 If you have not built local Suppliers, the window will be blank.



Click the TABS to review the other regions and checkbox.

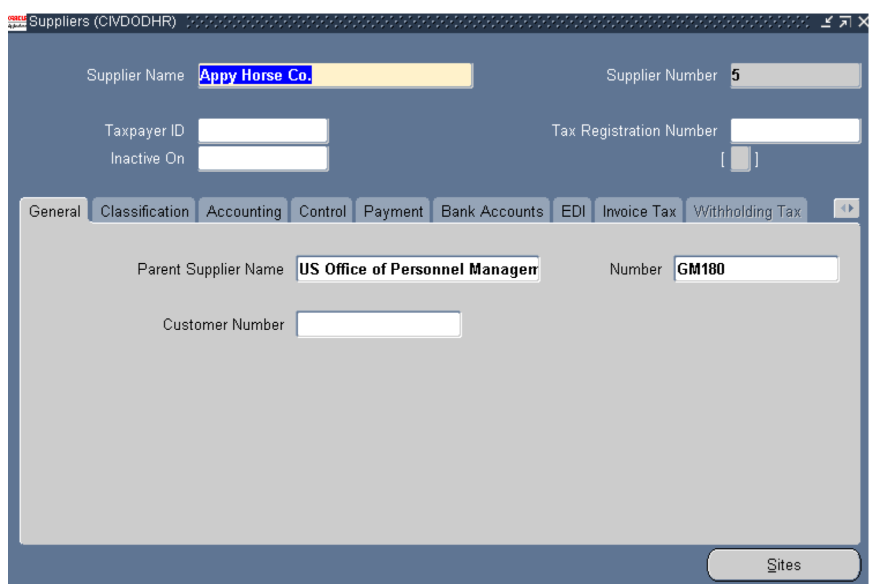

</td></tr>
</table>

Continued on next page

Chapter Overview, Continued

Accessing the Suppliers Summary Window (continued)

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>3</td><td colspan="2">If the Supplier you need…</td></tr>
<tr><td></td><td>Is listed, click <Open>.</td><td>Is not listed, click <New>.</td></tr>
<tr><td></td><td>• The Suppliers window opens with the name of the Supplier populating in the Supplier name field.
• Review information to ensure accuracy. If ok,
• Exit the window and move to the next process, Defining an Activity.</td><td>• The cursor drops down to the next empty line.
• Type the name of the new supplier (up to 80 characters).
• Do not type in the remaining columns.
• Click <Open>.</td></tr>
<tr><td></td><td colspan="2">Note: If you have no local Suppliers built, click <Open>.</td></tr>
<tr><td>4</td><td colspan="2">The Suppliers window opens. The window has a Supplier Name Region, (only Classification and Sites are used by DoD), a Type data field, and two checkboxes. Complete the data fields as indicated.


</td></tr>
</table>

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Creating a Local Supplier for a Local Activity, Continued

Completing the Suppliers Window

Step	Action
5	Place the cursor in the ***Supplier Name*** data field to enter the following data:

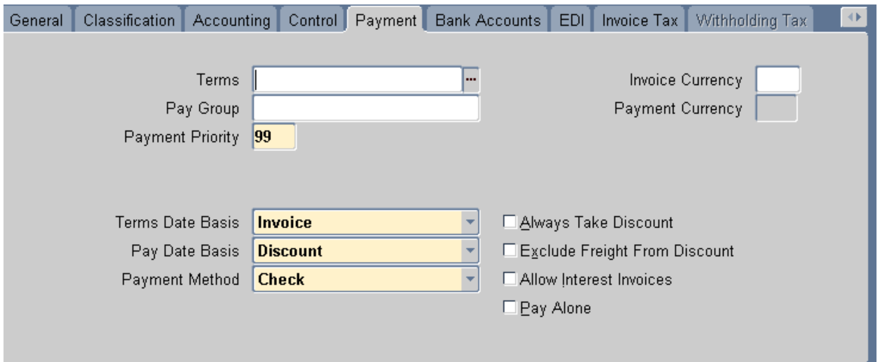
Data Field	Action
Supplier Name	Type in the name up to 80 characters.(mixed case)
Taxpayer ID	Type in number (optional).
Inactive After	Leave blank if planning to use again or type in date if not.
Number	System generated.
Tax Registration Number	Type in number (optional).
[ ]	Not customized for DoD.
Type	Click the LOV and select vendor.
Employee Name	Not active (optional).
Number	Not active (optional).
One-Time Checkbox	Click checkbox if the supplier is being used one time (optional).
SIC	Standard Industry Code (optional).
Minority Owned	Self-explanatory (optional).
Small Business Checkbox	Click checkbox (optional)
Woman Owned Checkbox	Click checkbox (optional)

Note: If you're Component does not require the optional fields, leave blank.

Continued on next page

Chapter Overview, Continued

Completing the Suppliers Window (continued)

Step	Action
6	Click the ***Payment Tab*** to enter payment. Information.
7	The *Payment* tab opens with seven data fields and four checkboxes. The first four data fields (***Terms***, ***PayGroup***, ***Payment Priority***, and ***Invoice Currency)*** are optional. The ***Terms Date Basis*** data field is a required Oracle field and must be entered. Click the *Sites* button. 

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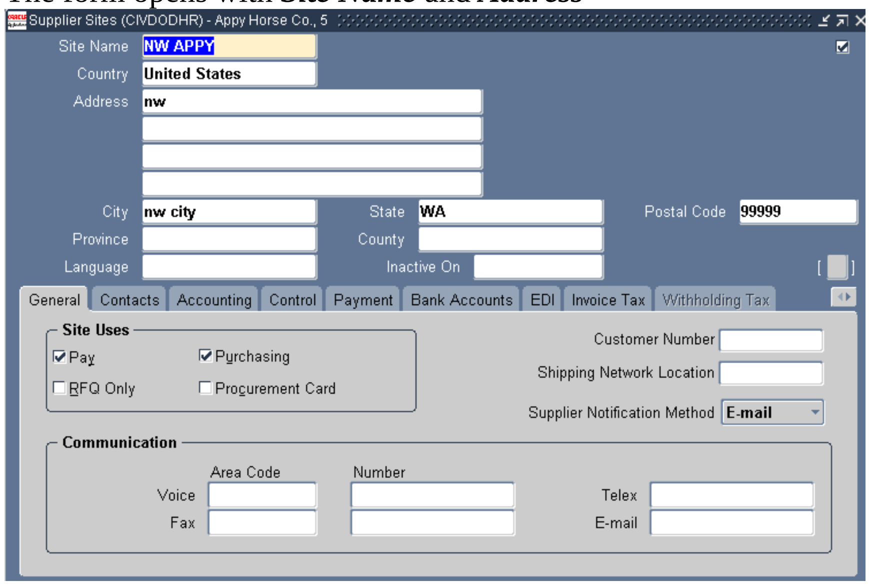
Creating a Local Supplier for a Local Activity, Continued

Completing the Suppliers Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>The form opens with Site Name and Address

</td></tr>
<tr><td></td><td>Note: The DD Form 1556 picks up the location (Block 19c) from the Center on the Scheduled Event. If your vendor provides training at various locations, use Quick Codes (Chapter 7) to add them to the LOV.</td></tr>
<tr><td>9</td><td>The Supplier Sites window opens with the vendor name on the Title bar click the Contacts tab to enter Sites Telephone. Place your cursor in the Name data field to enter the following:</td></tr>
</table>

Continued on next page

Creating a Local Supplier for a Local Activity, Continued

Completing the Supplier Sites Window

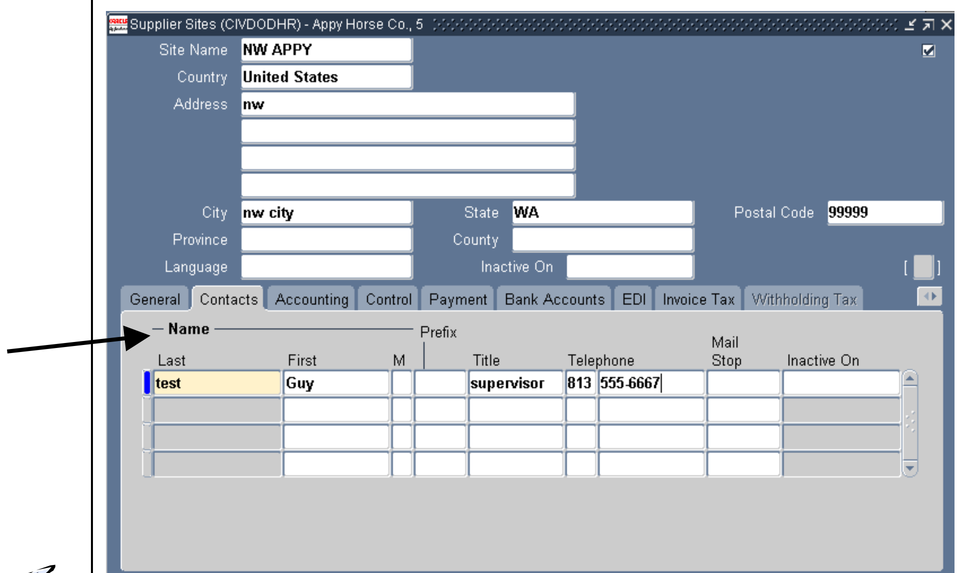
Step	Action
9 con't	

Data Field/Region	Description/Action
Name	Type in **name of the site** (location where training is to be conducted) (15-character limit). Required but not used.
Country	Click the LOV or type in.
Address	Type in street address of vendor.
State	Type in state address of vendor.
Postal Code	Type in zip code of vendor address.
Language	Click in field – populates with the default to American English (language in which the course is taught).
Inactive On	Type in date the vendor becomes inactive, if appropriate.
Global DDF	Flexfield is not customized for DoD.
Site Uses Region	Checkboxes not required.
Telephones Region	Type in Voice or Fax information to include area code.

Continued on next page

Chapter Overview, Continued

Completing the Supplier Sites Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Click Save on the Toolbar. Exit the window.
Example:


Note: You can enter the vendor's email address at the beginning of the address data field. It will then display first in the address string of information.</td></tr>
<tr><td>11</td><td>Click <New> or <Open> to create/display another local vendor.</td></tr>
</table>

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Defining a Local Activity

Purpose

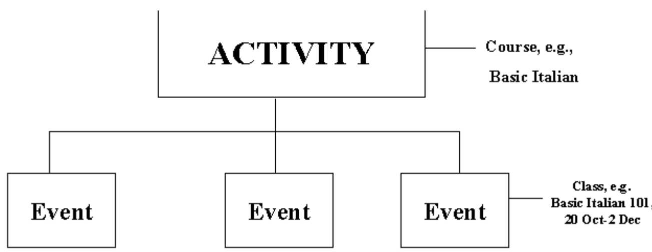
This section guides you through the steps to set up a local Activity (course) which is usually the first action taken after a **Training Request Form** is completed or received, and before an employee can be enrolled in training. You must set up a local Activity if it is not in the DoD Course Catalog.

Definitions

Activity - defines the courses listed in the DoD Central Course Catalog as Well as what a local supplier (vendor) can offer. Local courses can Be built for Local Activities. An Activity can be any of the following:

- A training course conducted internally or bought from an external supplier, regardless of method; e.g., classroom, CBI, correspondence, seminar.
- On-the-job training and apprenticeships.
- Work experience and cross-training.
- Educational Activity (college/university courses).

Activity Type – one of the nine OPM training course code types expanded to include functional areas within DoD; e.g., Acquisition, as described in this Module overview.



See Also

In this Module:
Overview
Section: Course Training Type Codes
Chapter 1, Requesting Training
Section: Completing the Training Request Form
Chapter 3, Managing Enrollments, Cancellations, and Attendance
Section: Enrolling an Employee
In this Chapter:
Building and Booking Resources

Continued on next page

Defining a Local Activity, Continued

Who Does This

Components will determine who will be given this responsibility.

Before You Begin

- You must accomplish these actions in the following sequence before an employee can be nominated or scheduled for training:
  - Build a Local Supplier, if needed.
  - Define an Activity, if needed.
  - Schedule an Event.
  - Schedule sessions, if more than one (not required).
  - Enroll an employee.
- Once an Activity is defined, it does not have to be rebuilt for each subsequent event. **As long as the Activity is not end dated**, you can skip directly to Scheduling an Event. If the Activity already exists, you will receive a message.
- You must identify a new supplier (if not in the DoD Course Catalog) before an Activity (course) can be built.
- You can have multiple Activities of the same type with different validity dates. If you want to run concurrent versions of an Activity, use dates to control when the Activity can be scheduled.
- You cannot run Events for the Activity earlier than the start date or later than the end date.
- If you build a Local Activity and don't remember what Activity Type it is, use the Course Title LOV on the Training Request Form to access it.

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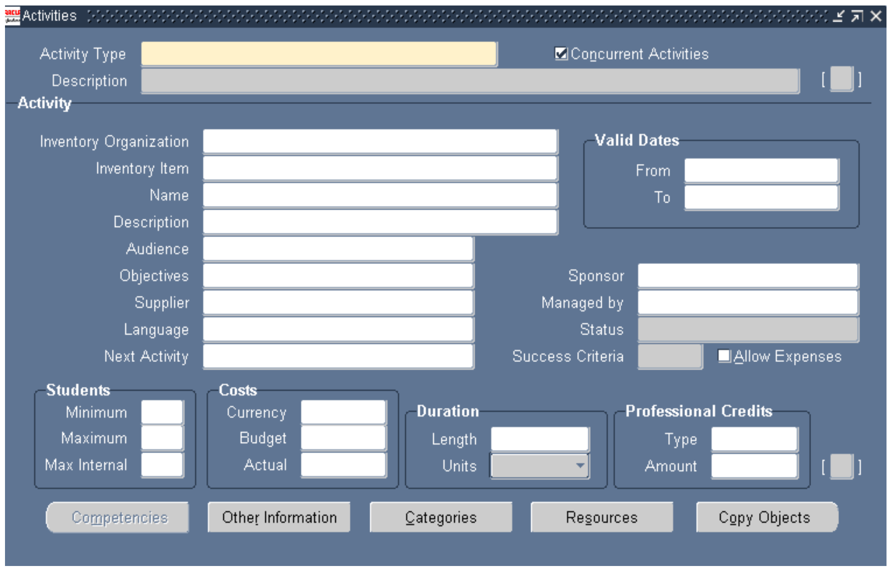
Defining a Local Activity, Continued

Completing the Activities Window

Step	Action
1	**Navigation Path** → *Activities* → **<Open>**.
2	The **Activities** window opens. With your cursor in the ***Activity Type*** data field, press the F11 button on your keyboard to begin the query, enter search criteria followed by the %. Press both CTRL + F11 keys to execute the query 

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Defining a Local Activity, Continued

Completing the Activities Window (continued)

Step	Action
3	The ***Activity Type*** and ***Description*** display the nine expanded OPM Training Course Code Types and expanded functional codes for a total of 21 selection codes. These codes should not be altered. **Caution:** Use the **[Tab]** key to proceed to each data field; the up/down keys will move you to a new **Activity** window. If you inadvertently use the arrow keys and a new **Activity** window opens, click **Go** on the Toolbar and select **Previous Record** to return to your working window.
4	Select the **Concurrent Activities Checkbox** to set up multiple activities of the same type with different validity dates. For example, you may have an activity that is delivered as both a day course and as an evening course.
5	Click the DDF to open the **Additional Activity Information** window. **Note:** All data fields are currently optional.

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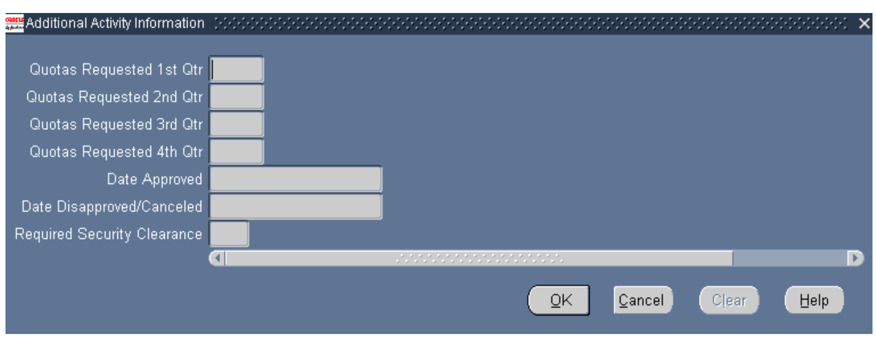
Defining an Activity, Continued

Completing the Additional Activity Information

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1</td><td colspan="2">Click in the Descriptive flexfield  to invoke the Additional Activity window, and complete the following:</td></tr>
<tr><td></td><td>Data Field</td><td>Description/Action</td></tr>
<tr><td></td><td>Quotas Requested 1st Qtr</td><td>Type in number (optional field).</td></tr>
<tr><td></td><td>Quotas Requested 2nd Qtr</td><td>Type in number (optional field).</td></tr>
<tr><td></td><td>Quotas Requested 3rd Qtr</td><td>Type in number (optional field).</td></tr>
<tr><td></td><td>Quotas Requested 4th Qtr</td><td>Type in number (optional field).</td></tr>
<tr><td></td><td>Date Approved</td><td>Type in date (optional field).</td></tr>
<tr><td></td><td>Date Disapproved/ Canceled</td><td>Type in date, if disapproved (optional field).</td></tr>
<tr><td></td><td>Required Security Clearance</td><td>Defaults to N (No Clearance) to make a selection for the Security Clearance for the Activity (optional field).</td></tr>
<tr><td>2</td><td colspan="2">Click <OK> on the Additional Activity Information window once you have completed the data fields.
Example:

</td></tr>
<tr><td>3</td><td colspan="2">The populated Activities window opens. Click the Save icon.</td></tr>
</table>

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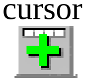
Defining a Local Activity, Continued

Entering a Local Activity Name

Step	Action
4	With your cursor in the ***Name*** data field, scroll through the Activity (Course) Names using the Page Down or Page Up keys to locate the one that matches the TRF from your Civilian Inbox or which you plan to define. If you do not find a match to the Activity you wish to locate, you may begin to define an Activity.
5	To enter a new activity name (local course), select the activity type (e.g., Orientation, Acquisition, Executive) that most closely relates to the new course. With your cursor in the activity name field, select the New Record Button  on the Toolbar. This will clear the last record and allow you to input information for the new Activity name and remaining fields in the Activity Region:

Fields, Buttons, and Checkboxes	Description/Action
Activity Region:	
Name	Type in the name of the new activity up to 2000 characters. (mixed case)
Description	Type in up to 2000 characters.
Audience	Type in up to 2000 characters.
Objectives	Type in up to 2000 characters.
Supplier	Click the LOV. See procedures in this chapter to Build a Local Supplier.
Language	Defaults to American English.
Next Activity	Used to identify the successor activity after the current activity has been end dated. (Optional)
Sponsor Org.	Populates with your organization but you can override by clicking the LOV and selecting another UIC or PAS code.

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Defining a Local Activity, Continued

Entering a Local Activity Name (continued)

Step	Fields, Buttons, and Checkboxes	Description/Action
5 (cont)	**Activity Region:**	
	Managed by	Type in the manager's name or registrar responsible. (optional)
	Status	Grayed out.
	Success Criteria	Grayed out.
	Allow Expenses Checkboxes	Not customized for DoD use.
	Valid Dates Region	Automatically opens the start (***From***) date when the activity is built. The (***To***) date is entered when the activity is ended. **Note:** End dating should be used sparingly as activities can be reused indefinitely.
	Students Region:	
	Maximum	Type in number of students. Populates when you complete the **Scheduled Event** Window. (optional)
	Minimum	Type in number of students.
	Max Internal	Type in number of students.
	Costs Region:	
	Currency	Defaults to USD.
	Budget	Type in total projected course cost (optional).
	Actual	Leave blank while building the Activity; input when known.

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Defining a Local Activity, Continued

Entering a Local Activity Name (continued)

Step	Action	
5 (cont)	**Fields, Buttons, and Checkboxes**	**Description/Action**
	Duration Region:	
	Length	Input number to match unit; e.g., 1 (week).
	Units	Select from drop down menu. Defaults to hours.
	Professional Credits Region	Add choices using Local Codes on the LOV. Professional_Credit_Type
	DDF	For Air Force use only (under development).
	Taskflow Buttons:	For local use:
	<Skills>	Will be used to enter information about the skills the activity is expected to provide; does not flow to CMIS. This information will be updated through the Look up Codes on the **Navigation List**.
	<Categories>	Used locally to group activities into three types – program, classification, package (e.g., acquisition, VRA). This information will be updated through the Look up Codes on the **Navigation List**.
	<Resources>	Used to specify resources required or useful to run the event for the activity; e.g., classroom equipment, trainer, venue. This information will be updated through the Look up Codes on the **Navigation List**. See Building and Booking Resources in this chapter.
	<Copy Objects>	Opens to show ***Copy From*** data field (with the activity auto-populated), ***New Activity*** data field, and four checkboxes (Categories, Resource Usages, Price List entries, Skills), and a <**Copy**> Taskflow Button.
4	Click Save on the Toolbar.	

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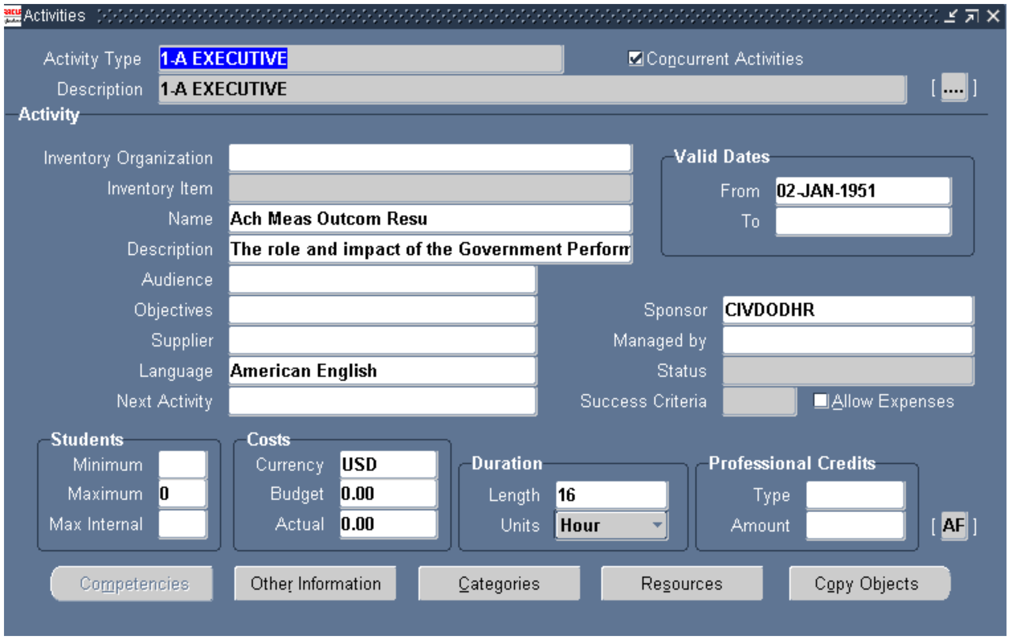
Defining a Local Activity, Continued

Entering a Local Activity Name (continued)

Activity Window

Example of a completed Activity window:



Scheduling an Event

Purpose

This procedure will guide you through the steps to schedule an Event which is the third action taken after a **TRF** is completed or received in the **Workflow Inbox**, and before an employee can be enrolled in training.

Definitions

Event - a specific instance of an Activity (course) scheduled to run on given dates, or a one-time **Event**, which is not related to an Activity. An Event can run any period of time you choose; e.g., several hours, days, or weeks.

Session - a unit of time within an **Event** for which you can independently book resources.

Example: To help you create a detailed agenda for an **Event**, you can break it down into shorter sessions, specifying the location with start and end times of each session. You might divide a one-day Event into four two-hour sessions.

Who Does This

Components will determine who has this responsibility. A standard naming convention for Event title may be needed.

Scheduling an Event, Continued

Before You Begin

- When you are ready to run an **Activity** (course), you create a scheduled **Event** for which you can book resources and enroll students.
  - An **Event** may run for any period of time you choose, that is several hours, days, or weeks.
  - There is no limit on the number of **Events** you can schedule for an Activity.
- If the Training Center location you need is not included, you can add it by following the instructions in Setting up Local Codes in Chapter 7.
- You can also:
  - Break down an **Event** into sessions. Sessions are discrete topics or time slots within an **Event**. You must enter the times using a 24-hour clock to include colons; e.g., 08:00.
  - Restrict an **Event** to internal employees or customers.
  - View or enter categories for the **Event.**

  Example: You may run the **Event** "*Using the DCPDS"* over a two week period setting up a session for each day in the two weeks. The first session on Day 1 might be "*Introducing the DCPDS";* the second session on Day 2 might be "*Getting Started,*" through the 10th day of the Activity (course).

  - You can book resources, such as venues (locations) and trainers, for the whole **Event** or for individual sessions.
  - Using Quick Codes, you can add other choices to the Event Status.
  - Other Navigator menu choices under Events besides Scheduled include:
    - Programs – not used by DoD, can be used to set up sequence type training for special programs such as intern training.
    - Development – not used by DoD.
    - One-Time Event – see procedures in this chapter.
    - Event Search – can use for search purposes or to build and book resources.

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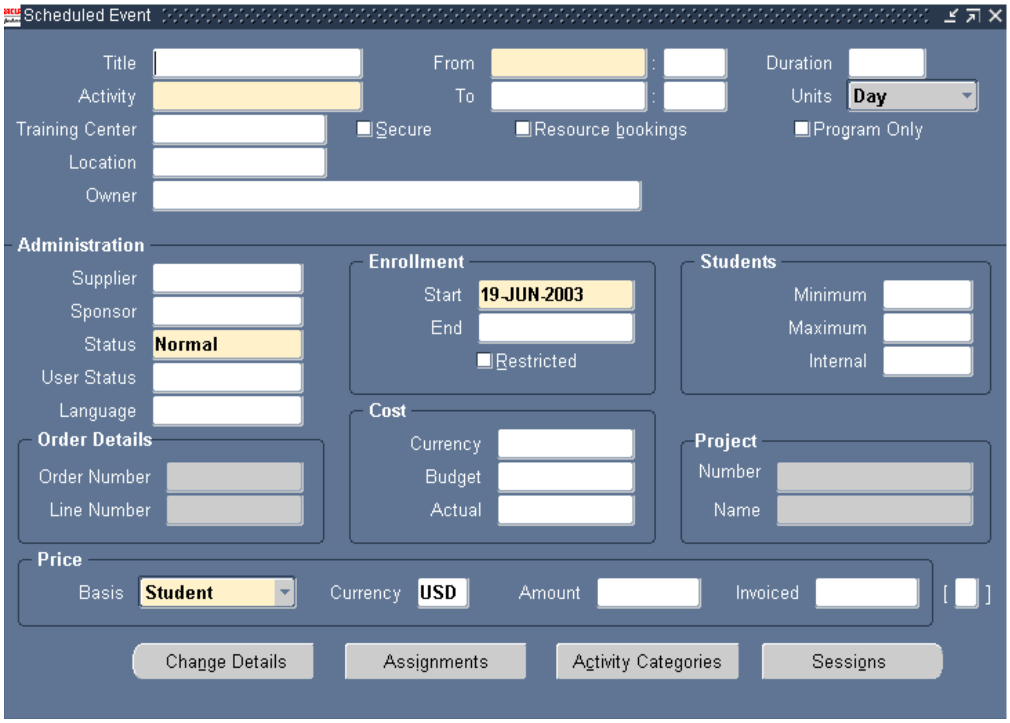
Scheduling an Event, Continued

How To Access the Scheduled Event Window

Navigation Path → *Events* → *Scheduled* → <**Open**>.



Taskflow Button	Description/Action
<Change Status>	To change the status of an **Event** by: • Closing or • Canceling or • Changing to Placed, Full, or others you may establish using Quick Codes. See Changing the Event Status in this Chapter.
<Assignments>	See procedure, Restricting an Event, in this chapter.
<Categories>	To group activities into three types.
<Sessions>	To create additional sessions.

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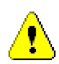
Scheduling an Event, Continued

Completing the scheduled Event Window

Step	Action
1	Place your cursor in the ***Title*** data field and complete the following:

Data Field	Description/Action
Title  	Type in a title (ALL CAPS, 80 characters or less) to identify the **Event**; e.g., Supervisory Training 2001-1. If you leave the title field blank, you will get a system-generated number, which is difficult to use to identify the **Event** later when you try to query. The title you enter or the system-generated number opens in a column on the **Enrollment Details** window when you reopen. **Note:** Components or local installations should determine how this title will be used. For example, you may want to include a location, start date, or component unique number; e.g., NWRegion. **Caution:** If you are trying to query on a title, be sure you have pressed F11 or enter query. Otherwise, the system will think you are establishing a new title that will result in a title that looks like %Admin%. If you realize you have not set up a query, click the clear record button  on the Toolbar and start over.
Activity	Click the LOV to select the **Activity**. This title appears in the employee Completed Training record. Certain information such as Status and Language auto-populates from the **Activity** window, but you can override it.

Continued on next page

Scheduling an Event, Continued

Completing the scheduled Event Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1
(cont)</td><td>
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Training Center</td><td>Click the LOV or type the first few letters to select the Training Center location of the Activity. To be determined is an LOV choice if location has not been set.</td></tr>
<tr><td>Secure Checkbox</td><td>Click if you want to limit updates to the sponsoring or administering organization.</td></tr>
<tr><td>From</td><td>Type the start date. The time of day is optional.
Note: You cannot backdate an Event.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Scheduling an Event, Continued

Completing the scheduled Event Window (continued)

Step	Action
1 (cont)	

Data Field	Description/Action
To	Type the end date with the time of day in the next field. ◆ **Example**: Use the time format of 14:00 for 2 PM if you want to create sessions. **Notes:** • Leave start and end dates blank if you want to create an **Event** with the Status of “Planned”; if you do not enter dates, the Event cannot have the status of “Normal.” • Leave the time of day blank if you are not creating sessions. Also, ensure the times you enter start on (or before) and finish on (or after) the earliest and latest session times.
Resource bookings Checkbox	Select the checkbox if you have booked resources for an **Event**.
Duration	Type in length of unit; e.g., 40 if your units = hours. The system defaults to hours.
Units	Defaults to hours but you can override it.
Program Only Checkbox	Select to make the **Event** part of a program and restrict attendees.
Supplier	Select Supplier from LOV.
Sponsor	Populates from Activity.

Continued on next page

Scheduling an Event, Continued

Completing the scheduled Event Window (continued)

Step	Action: Data Field	Action: Description/Action
1 (cont)	**Status**	Defaults to Normal. You can use Quick Codes to add or change choices on the LOV. **Note:** Event status controls the type of enrollments you can enter for the Event.
	User Status	Not used by DoD.
	Language	Click the LOV to select a language.
	Enrollment Start/End	Defaults to class start and end date. Override with the dates you need enrollments to start and end.
	Restricted Checkbox	Select if you want to restrict enrollments to internal students with certain assignments, or to restrict enrollments to external students from selected customers; otherwise, leave the box unchecked to open the **Event** to any customer or external student.
	Students Region:	
	Minimum/ Maximum/	Input the minimum and maximum number of students. OTA automatically sets the **Event** status to “Full” when the maximum is reached when you complete the **Event Status Change** Window. (optional)
	Internal	Optional field. Use to limit the number who can attend from one organization on the same date.

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Scheduling an Event, Continued

Completing the scheduled Event Window (continued)

Step	Action
1 (cont)	<table><tr><th>Data Field</th><th>Description/Action</th></tr><tr><td>**Cost Region:**</td><td></td></tr><tr><td>**Currency**</td><td>Click the LOV to select currency used. You must have USD in the ***Currency*** data field in order to enter a dollar amount in the ***Amount*** data field.</td></tr><tr><td>**Budget**</td><td>Auto-populates amount from **Activity** window.</td></tr><tr><td>**Actual**</td><td>Defaults to “0”.</td></tr><tr><td>**Price Region**</td><td></td></tr><tr><td>**Basis**</td><td>Defaults to Student. Click the drop-down menu to make other choices.</td></tr><tr><td>**Currency**</td><td>Type in USD.</td></tr><tr><td>**Amount**</td><td></td></tr><tr><td>**Invoiced**</td><td>Leave blank; field protected against update.</td></tr><tr><td>**DDF**</td><td>Click to open the **Additional Event Information** window.</td></tr></table>
2	**Additional Event Information** window opens. See steps to complete in the next procedure.

Continued on next page

Scheduling an Event, Continued

Completing the Additional Event Information Window

Step	Action
3	With your cursor in the first field, complete the following:

Data Field	Description/Action
Agency Group	Click the LOV (required field).
Method	Click the LOV (required field).
Tuition Per Student	Type in the dollar amount. This may be a different amount depending on the student.
Books/Material/ Other Fees	Type in cost, if known.
Total Direct Cost	System totals sum of Tuition Per Student and Book/Material/Other fees from previous data fields.
Total Indirect Cost	Enter total indirect cost.
Total Event Cost	Leave blank. Once you save the DDF and open again, the total opens.
Date Voucher Paid	Leave blank – data field to be moved to another window.
Billing Organization	Type in name of organization that will pay invoice, to include email if needed.
Street	Type in street address of billing organization.
City/State/Zip	Type in the city, state, and zip code.
ATTN:	Type in name of person in billing organization.
Phone	Type in phone number of billing organization.
Additional Event Information	Click LOV. (WHS/AFTMS use only)

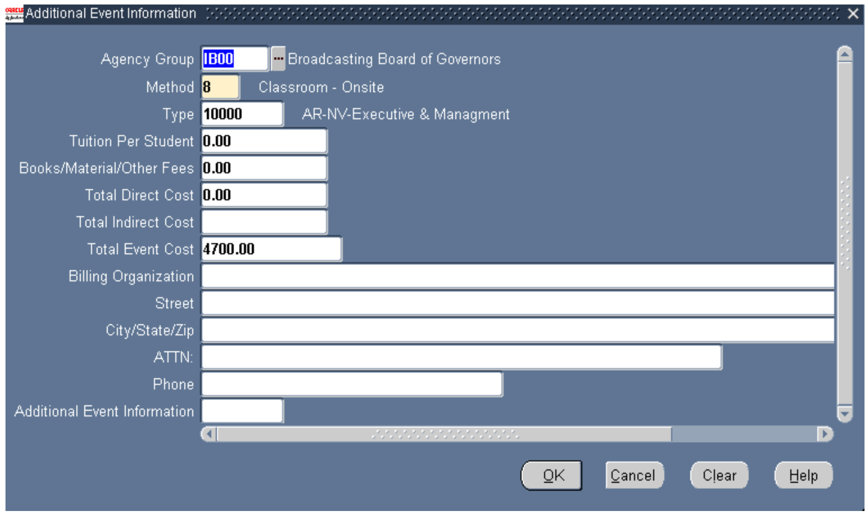
Continued on next page

Scheduling an Event, Continued

Completing the Additional Event Information Window (continued)

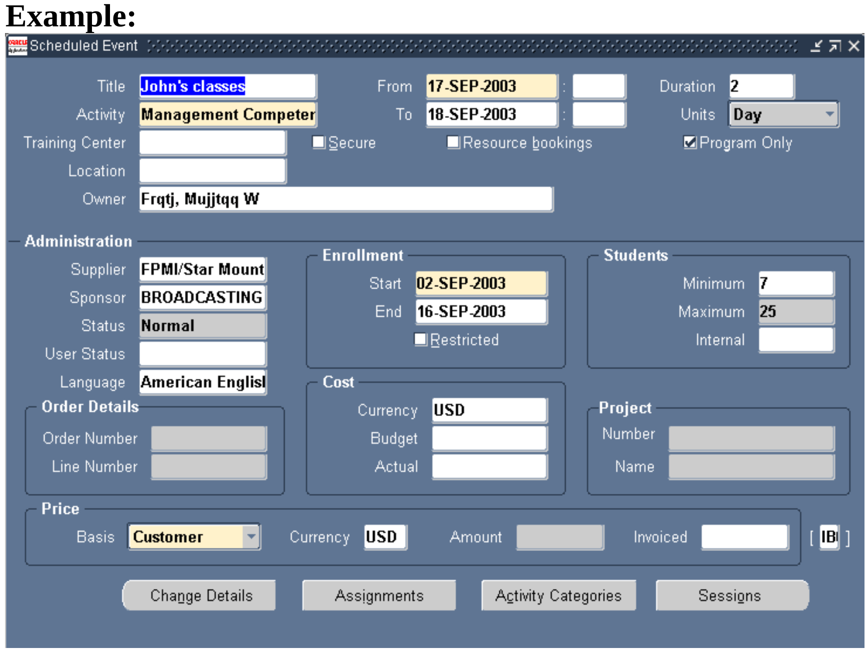
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>

Click the **<OK>** button and click **Save** icon.
Example:



</td></tr>
<tr><td>5</td><td>

The **Scheduled Event** window opens with the data populated. Click Save  on the Toolbar.
Example:

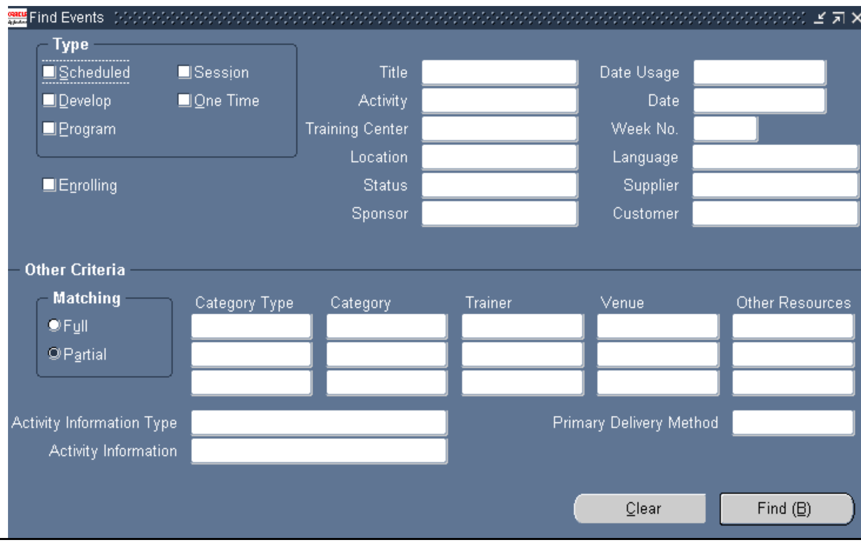


</td></tr>
</table>

Querying for an Event

Querying for an Event

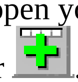
In addition to the Querying methods you learned in the Fundamentals Module, OTA has a unique querying feature with the **Find Events** window that allows you to specify the Type of Event by Activity, Center, or Status. Use the following steps to query for an Event.

Step	Action
1	**Navigation Path** → *Events* → *Events Search* → <**Open**>.
2	The **Search for Event** window opens. Query for the Event by pressing the F11 button / CTRL + F11 and using the *Current Record Indicator* to find the Event you want. Or Press F11, place the cursor in the Title or Activity block, type a portion of the name (e.g., %Man%) and Press Ctrl + F11. 
3	Click <**Find**>. The **Search for Event** window opens with the selected Event(s) populated.
4	Select the Event you need and continue your action.

Continued on next page

Copying an Event

Copying an Event

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>With the Scheduled Event window open you need to copy, click the New Record button on the toolbar .</td></tr>
<tr><td>2</td><td>A new Scheduled Event window opens.
With your cursor on each data field you want to duplicate from the previous Event.

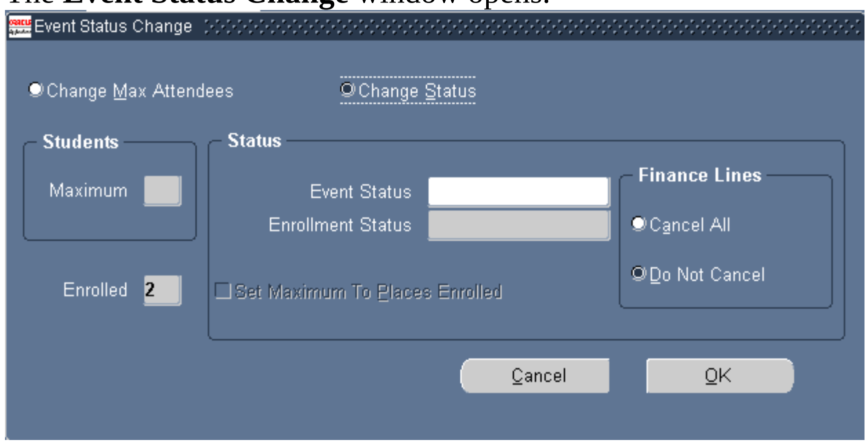
Note: New data must be entered in the DDF, as it will not copy.

<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Title</td><td>Will be blank; type in a unique title that you will be able to identify later.</td></tr>
<tr><td>Activity</td><td>Press F3 on the keyboard to populate.</td></tr>
<tr><td>Center</td><td>Press F3 to populate.</td></tr>
<tr><td>From and To</td><td>If you do not plan to use the dates from the original Event, input new dates and hours.</td></tr>
<tr><td>Duration</td><td>Click F3 to populate.</td></tr>
<tr><td>Units</td><td>Defaults to day when you press F3; you can override.</td></tr>
<tr><td>Status</td><td>Defaults to Normal as you are creating a new record.</td></tr>
<tr><td>Enrollment Region</td><td>Defaults to today's date; type in the dates needed.</td></tr>
<tr><td>Price Region</td><td>Defaults to Student; select from the drop-down menu.</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>Click Save on the Toolbar once you have completed all fields and proceed with your action on the Event.</td></tr>
</table>

Changing the Event Status

Changing the Event Status

Once you have scheduled an **Event**, you might need to make changes at a later time. The types of changes might include maximum number of students or status of the **Event**. Changing Max Attendees is discussed in Chapter 3.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the <Change Details> button on the Scheduled Event window.</td></tr>
<tr><td>2</td><td>The Event Status Change window opens.


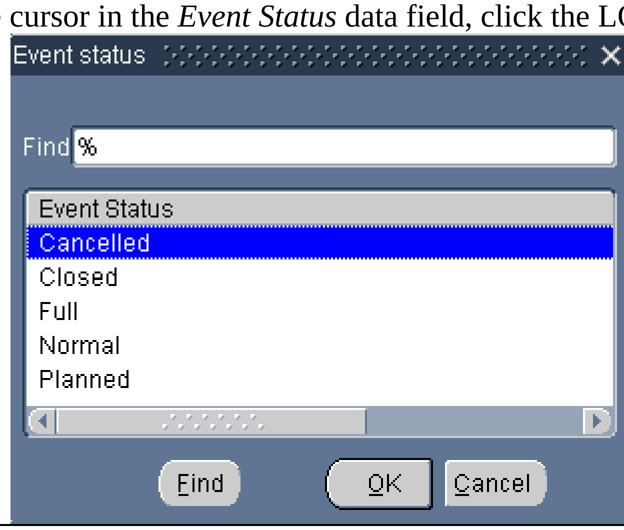
There are two buttons at the top of the window.
Change Max Attendees
Change Status
The Students Region has a Maximum field, which can be changed by increasing or decreasing the number.
The Status Region has the Event Status data field and the Enrollment Status data field with a checkbox for Set Maximum to Places Enrolled. If the Event is Full, you can prevent any new enrollments by changing the Event status to “Closed.” This automatically cancels any enrollments with the status “Requested” as those enrollments have not been confirmed or approved.
The Finance Lines Region is not currently used by DoD.</td></tr>
</table>

Continued on next page

Changing the Event Status, Continued

Changing the Event Status (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Select the Change Status radio button.

Notes: If the Secure checkbox is selected on the Scheduled Event window, you can update the Event if you are assigned to the organization that is administering the Event.</td></tr>
<tr><td></td><td>If the Event Status is:
<table>
<tr><td>Planned</td><td>All enrollments must be Requested, Waitlisted, or cancelled.</td></tr>
<tr><td>Full</td><td>You can only enter new Requested or Waitlisted enrollments.</td></tr>
<tr><td>Closed</td><td>If you close it, or the enrollment period elapses, you cannot enter new student enrollments.</td></tr>
<tr><td>Cancelled</td><td>All enrollments change automatically to status Cancelled, and you cannot enter any new enrollments.</td></tr>
</table></td></tr>
<tr><td>4</td><td>With the cursor in the Event Status data field, click the LOV.

</td></tr>
<tr><td>5</td><td>Click “Cancelled” and click <OK>.</td></tr>
</table>

Continued on next page

Changing the Event Status, Continued

Changing the Event Status (continued)

Step	Action
6	The ***Enrollment Status*** data field now opens, with your cursor in it, click the LOV.
7	Click “Cancelled.” Click <**OK**>. A Caution Box opens and states “All Enrollments will be Cancelled.” Click **<OK>**. **Note:** When you select “Cancelled” or “Planned” from the Event Status LOV, the ***Enrollment Status*** data field on the **Event Status Change** window opens, with other choices.
8	To check the changes you made, re-query the Event and check the ***Status*** data field to see if the new status is reflected. **Note:** “Waitlisted” can be added to the LOV. See Chapter 7, Setting Up Local Codes for additional information.

Restricting an Event

Restricting an Event

You can Restrict an Event to a specific organization, job title, or position, on the **Scheduled Event** window.

Step	Action
1	In the **Scheduled Event** window, select the *Restricted* checkbox  (under the Enrollment Region) then click the **<Assignments>** button.
2	The **Valid Assignments for Restricted Event** window opens with the Event in parenthesis on the window title. Click the LOV to populate *Organization* and *Job* columns. Click Save on the Toolbar. ◆ **Example**: 
3	Exit the window. **Note:** Future enrollments will allow you to enroll only those personnel you specified by Organization and Job series/title.

Creating a One-Time Event

Purpose

This procedure guides you through the steps to create a One-Time Event when it is more appropriate than creating a Scheduled Event.

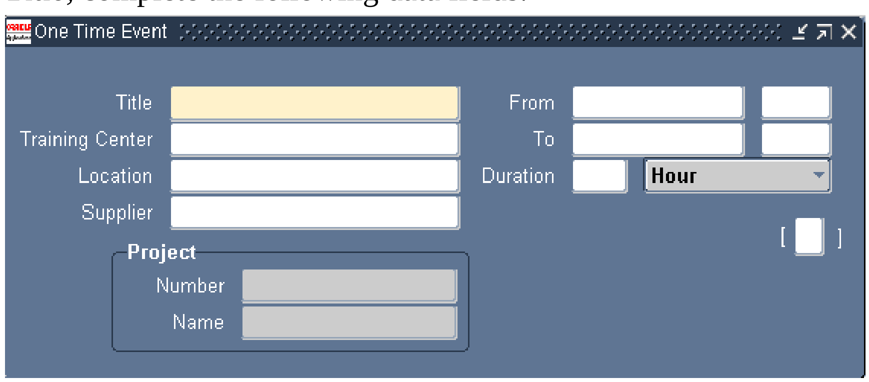
Note: You must run the *Submit One Time Event Update HR* report before you begin this process in order for the information to flow to Oracle HR. See Chapter 6, Reports, for details.

Before You Begin

- You can create a One-Time Event for Events that are normally less than eight hours, do not require an Evaluation, and are mandated to be recorded in the employee's record. Examples would be training on Ethics, HIV, or computer security, which usually involves scheduling the entire workforce. **One-Time Events are based on a 24-hour clock**.
- The **One Time Event** window is designed for rapid entry of minimum event information to support student enrollments. It does not support the full features of the **Scheduled Events** window.
- Once you create a One Time Event, you cannot change it. You can query for it on the **Search for Event** window or enroll students in the **Enrollment Details** window.

Creating a One-Time Event

Follow the steps below to create a One-Time Event. Use the same procedure in Chapter 3, Enrolling an Employee, once your event is built.

Step	Action
1	**Navigation Path** → *Events* → *One-Time* → <**Open**>.
2	The **One Time Event** window opens. With your cursor in the ***Title***, complete the following data fields: 

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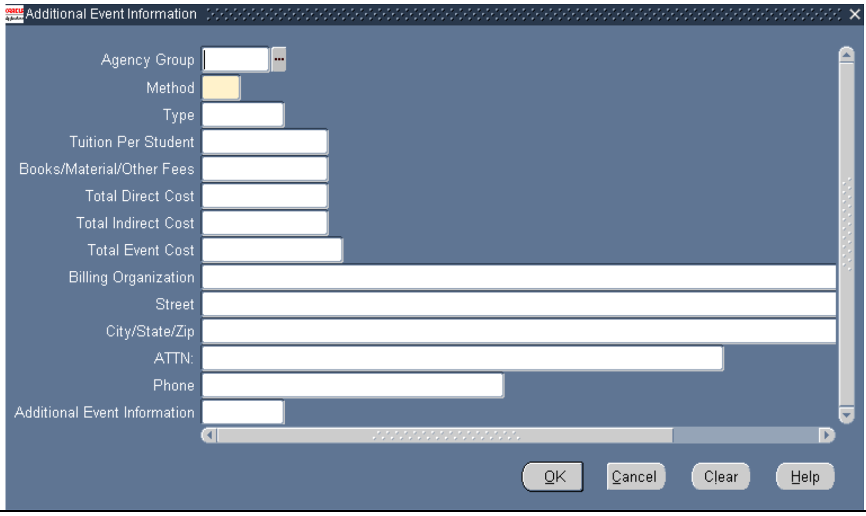
Creating a One-Time Event, Continued

Creating a One-Time Event (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2
(cont)</td><td>
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Title</td><td>Type in the Event title.</td></tr>
<tr><td>Center</td><td>Click the LOV to make the selection.</td></tr>
<tr><td>Supplier</td><td>Click the LOV to make the selection.</td></tr>
<tr><td>From</td><td>Click the LOV to use the calendar. If a specific hour is used, it must be a 5-digit entry; i.e. 08:00 based on a 24-hour clock.</td></tr>
<tr><td>To</td><td>Click the LOV to use the calendar. If a specific hour is used, it must be a 5-digit entry.</td></tr>
<tr><td>Duration</td><td>Type in the number.</td></tr>
<tr><td>Hour</td><td>Click on the drop-down menu to select hours, days, week, etc.</td></tr>
<tr><td>DDF</td><td>Click the DDF to open the Additional Event Information Window.</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>The Additional Event Information Window and its data fields are described in the procedure on Scheduling an Event in this chapter. Complete the window and click <OK>. Agency is a required data field.


</td></tr>
<tr><td>4</td><td>Save your action.</td></tr>
</table>

Continued on next page

Using the Bulletin Board

Purpose

This procedure guides you through the steps to initiate surveys, advertise training events, and post instructions for students on the Bulletin Board.

See Also

In this Module:

Overview

Chapter 1, Requesting Training
Section: Completing the Training Request Form
Chapter 3, Managing Enrollments, Cancellations, and Attendance
Section: Enrolling an Employee

Who Has Access

Components will determine who will be given access to the Bulletin Board to post Events and surveys.

Before You Begin

- The Bulletin Board will be the primary means of announcing annual and special surveys, advertising events for all or selected personnel, announcing event changes and cancellations, and to provide special reporting instructions for students.
- To view the Bulletin Board announcements, click F11 / CTRL +F11. If there are a large number of entries, you can query either in the Title data field or the Text field.
    - All personnel may be assigned access to **view** the Bulletin Board.

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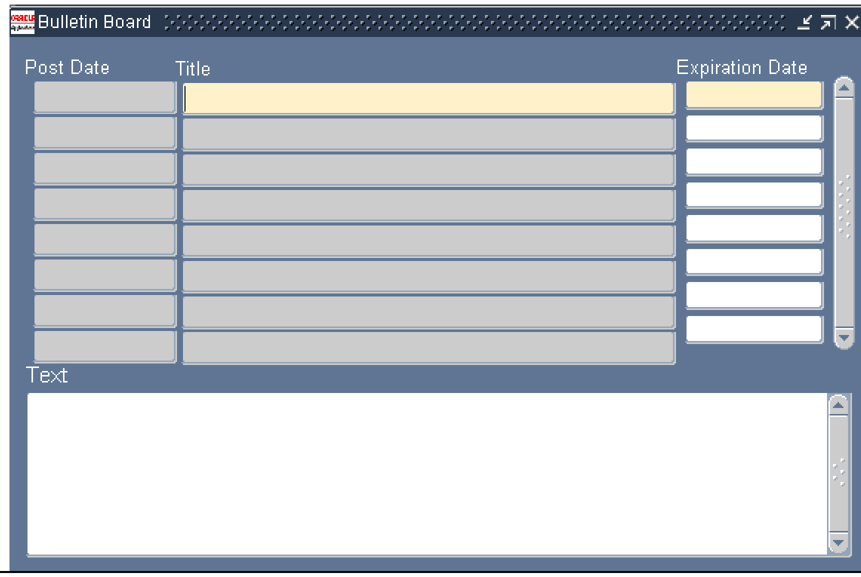
Using the Bulletin Board, Continued

Using the Bulletin Board

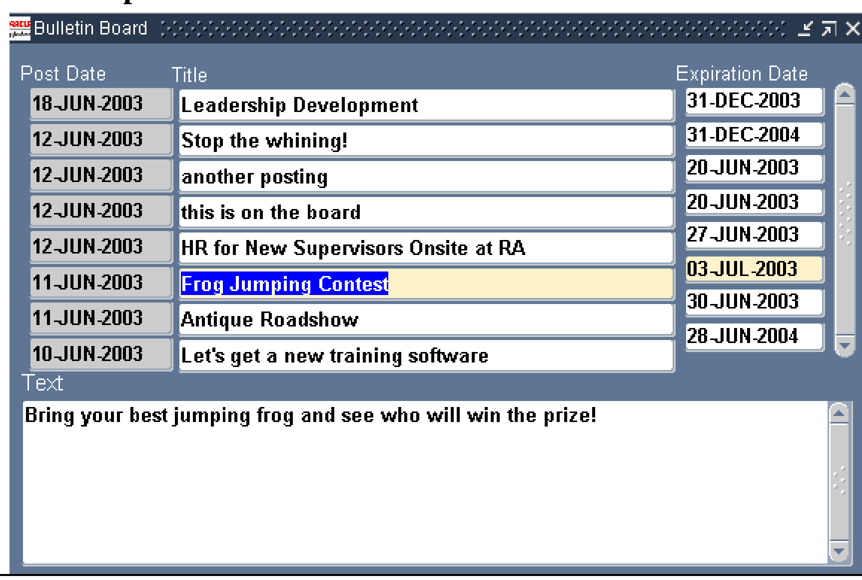
Step	Action
1	**Navigation Path** → *Bulletin Board* → **<Open>**.
2	The **Bulletin Board** window opens with three columns and a Text Box. Click F11 / CTRL +F11 to display current posted items. Complete the following data fields to post a new item. 

Data Fields	Description/Action
Post Date	Date the message was posted to the Bulletin Board.
Title	The subject assigned to a message.
Expiration Date	Date the message will be removed.
Text Box	Provides spaces for additional information such as course description, length, size, dates, point of contact, or nomination deadline with 2000 characters available.

Continued on next page

Using the Bulletin Board, Continued

Using the Bulletin Board (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>With your cursor in the Title data field, type the title of your course or message.</td></tr>
<tr><td>4</td><td>With your cursor in the <i>Expiration Date</i> data field, click the LOV and select a date. Click <OK>. The date populates the field.</td></tr>
<tr><td>5
</td><td>With your cursor in the Text box, type your message.
Note: You can input up to 2000 characters.</td></tr>
<tr><td>6</td><td>Click Save  on the Toolbar. The Post Date populates with today's date.
◆ Example:

</td></tr>
<tr><td>7</td><td>Exit the window.</td></tr>
</table>

Building and Booking Resources

Purpose

This procedure guides you through the steps to build and book resources for trainers, venues (locations), and other resources. Resources are any facilities, people, or equipment you need to book to run an Event.

See Also

In this module:

Chapter 2, Creating a Local Supplier

Chapter 2, Defining a Local Activity

Chapter 7, Setting up Local Codes

Who Has Access

You must be in the role of OTA Training Administrator.

Before You Begin

- You need to set up resources before you can associate them with activities and book them for events.
- You can define generic resource types, such as overhead projector or networked PCs. You define these as QuickCode values under Resource Type.

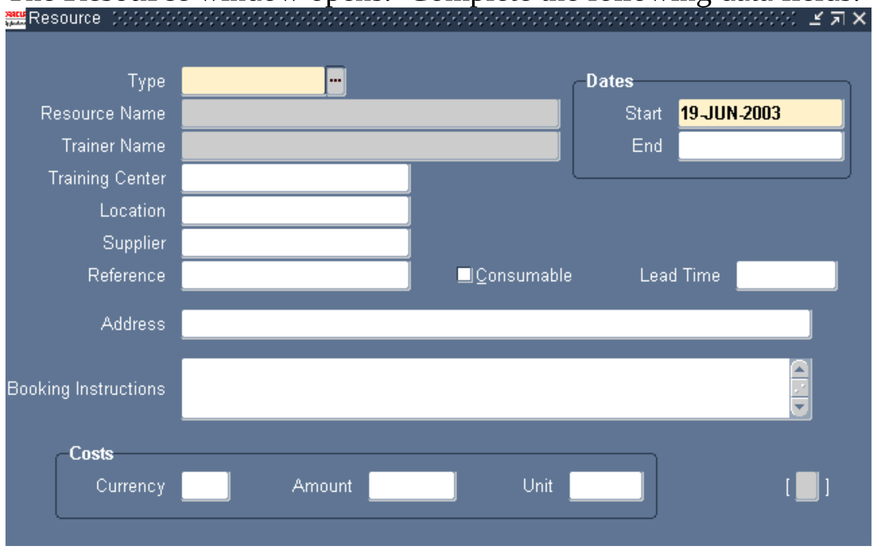
  You can also define specific resources available from a particular Supplier. For example, you could record the Grove International Hotel (Supplier) as one venue holding 500 people and four venues holding 100 people.

Continued on next page

Building and Booking Resources, Continued

Building a Trainer Resource

Step	Action
1	**Navigation Path** → *Resources* → *Definitions* → **<Open>**.
2	The **Resource** window opens. Complete the following data fields:



Data Fields	Description/Action
Type	Click the LOV and select Trainer.
Name	Query for last name, then select from the list. If not currently on the database, use the Building External Students process to add a name.
Supplier	Click the LOV and select from the list (Vendors) to include local suppliers you have built.
Reference	Free-form text (80 characters).
Lead Time	Enter the number of days you must schedule or book the Trainer in advance.
Consumable Checkbox	Click if the resource is consumed when used, and is not reusable. For example, markers and flip chart paper are normally consumable, whereas computers and venues are reusable.

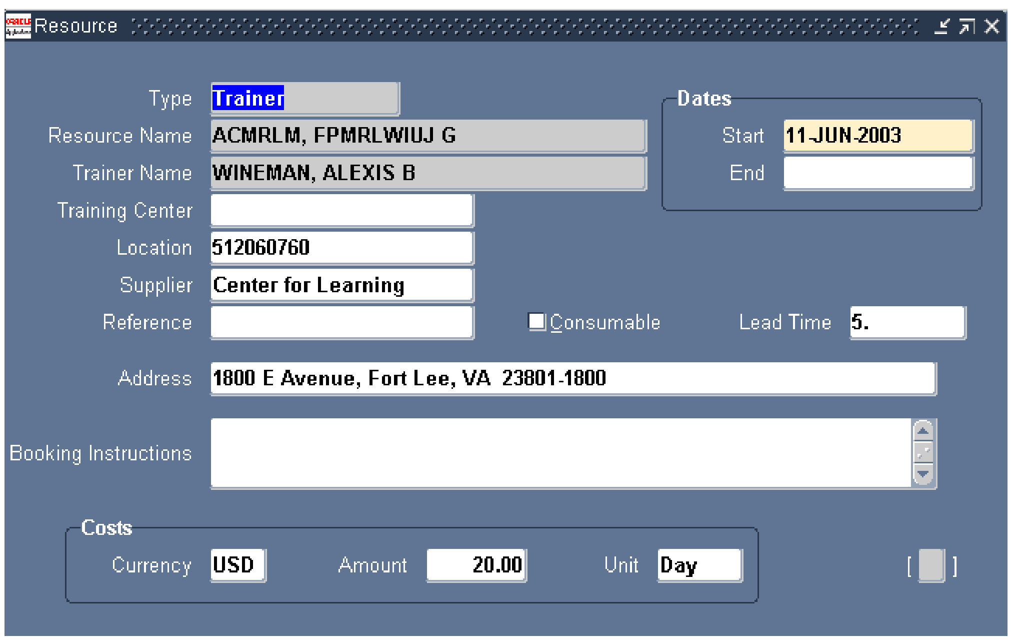
Continued on next page

Building and Booking Resources, Continued

Building a Trainer Resource (continued)

Step	Action	
2 (cont)	**Dates Region:**	Start date auto-populates with today's date but can be overridden with date resource is available. Enter End Date.
	Address	Type the address for the Trainer.
	Costs Region:	
	Currency	When you click the LOV, it defaults to USD.
	Amount	Type the cost per unit.
	Unit	Click the LOV and select day, hour, month, or year.
	DDF	Grayed out.
3	Save your action.	

Example of Trainer Resource Window



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Building and Booking Resources, Continued

Building a Venue Resource

Step	Action
1	**Navigation Path** → *Resources* → *Definitions* → **<Open>**.
2	The **Resource** window opens. Complete the following data fields:
	(see data fields table below)
3	Click Save.

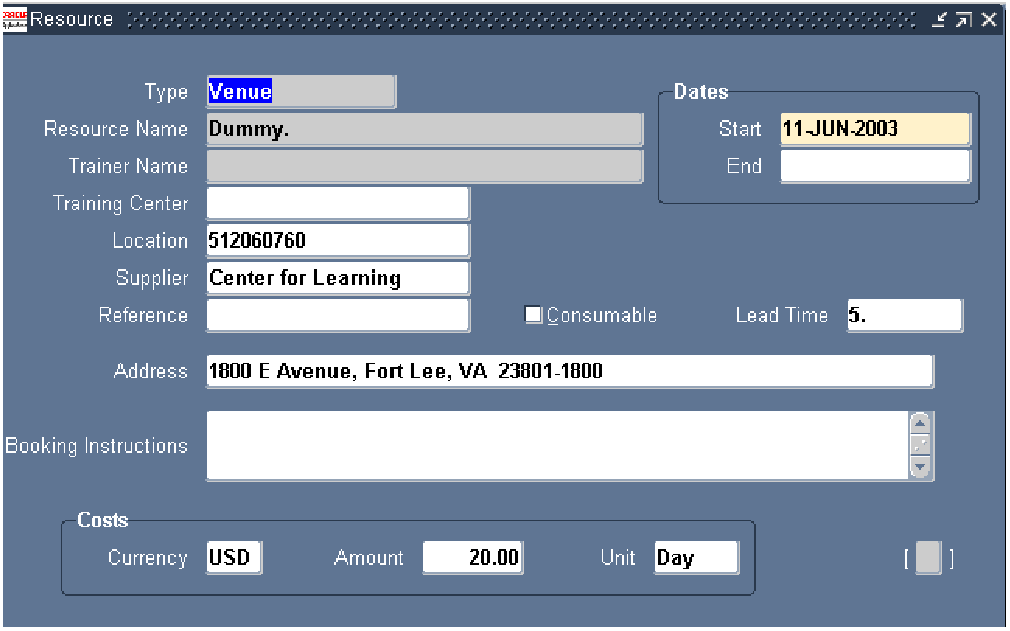
Data Fields	Description/Action
Type	Click the LOV and select Venue.
Name (of venue)	Two data elements display. Query for last name, then select from the list for the Center.
Supplier	Click the LOV and select from the list (Vendors) to include local suppliers you have built.
Reference	Free-form text (80 characters).
Lead Time	Enter the number of days you must schedule or book the Venue in advance.
Consumable Checkbox	Click if the resource is consumed when used, and is not reusable. For example, pens and paper are normally consumable, whereas computers and venues are reusable.
Dates Region:	Start date auto-populates with today's date but can be overridden when venue is available. Enter End Date.
Address	Type in address of the venue.
Costs Region:	
Currency	When you click the LOV, it defaults to USD.
Amount	Type the cost per unit.
Unit	Click the LOV and select day, hour, month, or year.
DDF	Grayed out.

Continued on next page

Building and Booking Resources, Continued

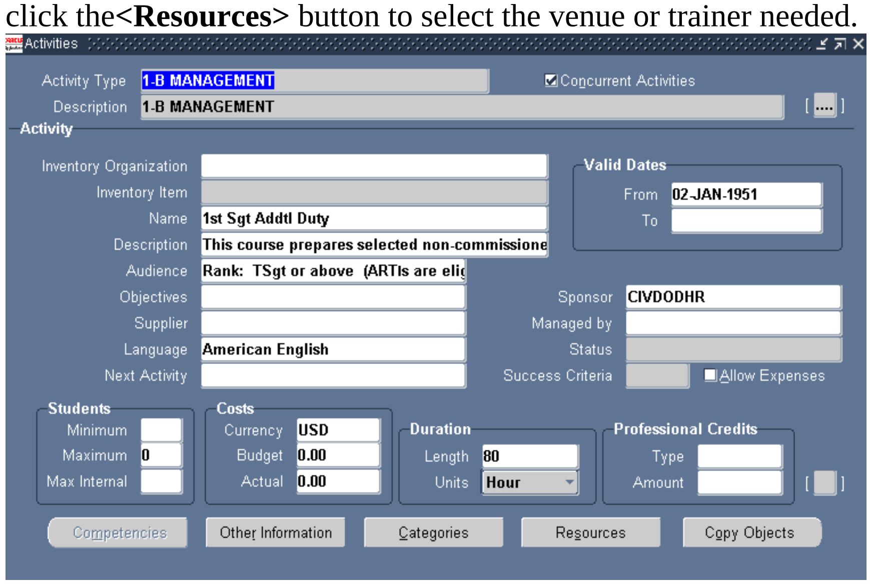
Building a Venue Resource (continued)

Example of Completed Venue Window



Booking the Resource

This can be accomplished two ways, either through the **Activities** Window or through the **Search for Event** Window. Method #1:

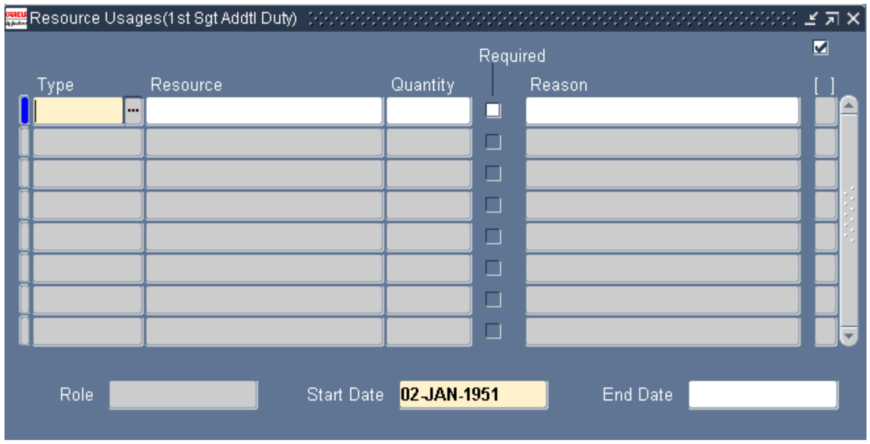
Step	Action
1	**Navigation Path** → *Activities* → *<**Open**>.*
2	The Activities window opens. When you build a Local Activity, click the<**Resources**> button to select the venue or trainer needed. 

Continued on next page

Building and Booking Resources, Continued

Booking the Resource (continued)

Step	Action
3	The **Resource Usages** window opens. Complete the following data fields.



Data Field	Description/Action
Type	Click the LOV and select Trainer, Venue, or other Resource type you have built.
Resource	If you clicked Trainer, select from the list of names you built.
Quantity	Type in number needed; such as number of PCs if you selected other Resource type.
Required checkbox	Select if required.
Reason	Click the LOV and select from the reasons you built in RESOURCE_USAGE.
DDF	Not used by DoD.
Role	Click the LOV and select from the roles you built in TRAINER_PARTICIPATION.
Start Date	Override the start date and use one within the availability of the resource when you built it.
End Date	Click the LOV to select a date within the resource availability.

Step	Action
4	Save your action.

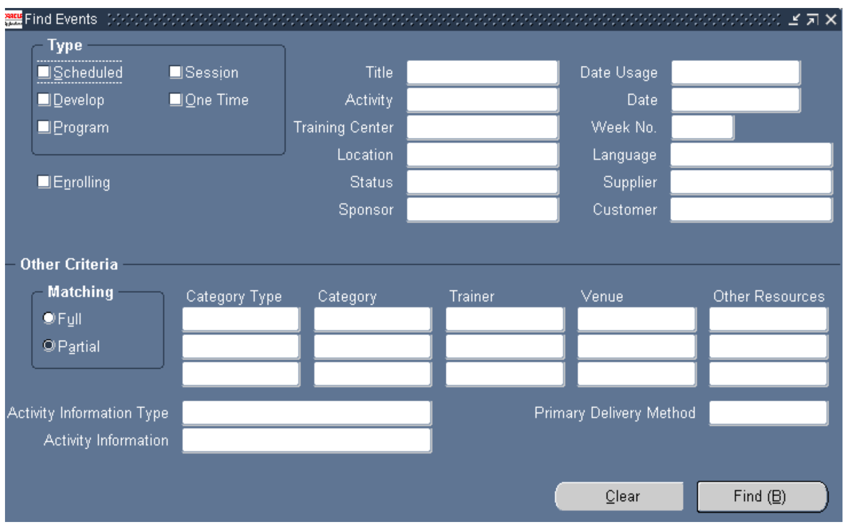
Continued on next page

Building and Booking Resources, Continued

Booking the Resource

Method #2:

Step	Action
1	**Navigation Path** → *Event Search* → <**Open**>.
2	The **Search for Event** Window opens. Query for the Event you need to book resources against, and then close the window.
3	The **Book Resources** window opens with **Resources Booked** and **Finance Headers** windows cascaded behind it. Complete the following data fields:



Data Field	Description/Action
Type	Click the LOV to select Trainer, Venue, etc.
Name	Click the LOV to select.
Quantity	Defaults to 1 but can be overridden.
From	Auto-populates.
To	Input date

Continued on next page

Building and Booking Resources, Continued

Booking the Resource (continued)

Step	Action	
3 (cont)	**Data Field**	**Description/Action**
	Status	Defaults to Confirmed but can be overridden with Planned.
	Start	Enter time of day. (08:00)
	End	Enter time of day.
	Trainer Role	Defaults to Facilitator.
	Max Usage	Free flow 11 characters.
	Event Region:	Not used.
	Delivery Region:	Freeflow text.
	Finance Region:	Not used.
	Supplier	Auto-populates when **<Availability>** clicked and trainer selected.
	Booking Date	Auto-populates with today's date.
	Booked By	Auto-populates with name of user.
4	Save your action.	

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